

# **TOWN OF LUNENBURG, MASSACHUSETTS**

## **Request for Proposals for Property Tax Administration Services**

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### **OVERVIEW AND BID FORMAT**

#### **Introduction**

The Board of Assessors for the Town of Lunenburg (hereafter “the Town”) seeks service proposals, resumes, sample contracts and price proposals from qualified individuals and/or firms to provide the Town with real and personal property tax administration services; such services to be described below. Due to the technical nature of the services required under the proposed contract, the Town has determined that this procurement is best served by using the RFP process under Massachusetts General Laws, Chapter 30B, Section 6. Such a process will enable the Town to evaluate the experience of the contractor and his or her ability to carry out the Town’s mandate of fair and equitable taxation. Because property tax administration is an important component of the Town’s overall financial health, it is important that the Town have the ability to select the most advantageous proposal on the basis of both cost and technical expertise.

The Town reserves the right to postpone or cancel the awarding of a contract for any and all reasons, but especially if price bids exceed available funding.

#### **Proposal Deadline, Questions, Format and Other Requirements**

**DUE DATE FOR SUBMITTING PROPOSALS IS**  
**Thursday, July 21, 2016 at 6:00 PM, EST**

Bidders shall submit five (5) copies each of their non-price and price proposal in separate sealed envelopes. All envelopes must be clearly labeled as to its contents, whether Non-price Proposal or Price Proposal.

Proposals must be delivered no later than the specified time to:

Town of Lunenburg  
Office of the Board of Selectmen  
17 Main Street  
Lunenburg, MA 01462

Late proposals will not be accepted and will be returned unopened. Proposed prices must be firm for 90 days from the date the proposal is due.

There will be no public opening of proposals. Resumes and proposed contracts will not be made public until after the Lunenburg Board of Assessors has completed its evaluation. Price proposals will be securely kept by the Town Manager's office and not disclosed to the Board of Assessors until it has completed evaluation of the proposed contracts.

Questions concerning this RFP should be submitted in writing by July 14, 2016 to:

Kerry Lafleur, Town Manager  
17 Main Street  
Lunenburg, MA 01462  
(978) 582-4144  
klafleur@lunenburgonline.com

Written responses to any questions that the Town determines are relevant to all will be distributed to all individuals that received the RFP.

The Town shall not be responsible for proposals arriving late due to couriers, deliveries to wrong locations, express mailing services etc. or any reason whatsoever. Postmarks will not be considered.

Any proposal may be withdrawn on written request received prior to the time fixed for the submission of proposals.

The successful proposer shall comply with all federal, state and local laws and regulations pertaining to the performance of the contract.

## Scope

Reporting to the Lunenburg Board of Assessors the selected individual or firm will provide part-time, contractual services to the Town. The services to be provided are as follows:

- a) Provide guidance the day-to-day operations of the office and support for all Real & Personal Property account maintenance.
- b) Prepare an annual assessment calendar detailing the various assessment tasks to be carried out by the office with proposed completion dates.
- c) Provide staff training and supervision.
- d) Prepare or oversee the preparation of all Department of Revenue (DOR) reports, surveys, and data submittals including the annual tax recapitulation.
- e) Conduct an annual assessment-to-sale ratio study in order to determine the level and uniformity of standing assessments, and revise CAMA tables in order to keep assessments in compliance with DOR regulations.
- f) Be responsible for the successful completion of the triennial certification process and interim year revaluations.
- g) Insure that records of the office, including maps and CAMA system records are maintained and current.
- h) Interface with the public and provide higher order assistance to same.
- i) Review all real estate and personal property abatement requests, preparing recommendations to the Board of Assessors on suggested actions relative thereto.
- j) Prepare for and represent the Board of Assessors at all Appellate Tax Board hearings, serving as the Towns' expert on property tax valuation matters.
- k) Meet with the Board of Assessors once a month or additionally at their request,
- l) Meet with other financial officers of the Towns in order to effectively coordinate and facilitate the Towns' financial affairs,
- m) Review all land divisions and set up new real estate accounts.
- n) Administration of chapter land accounts: reviewing applications, preparing liens, releases, rollback calculations, revising land values and classification which may include site inspections for verification.

- o) Conduct inspections of all building improvements under building permit, as well as, conduct approximately 550 periodic inspections of all other properties in order to adhere to the required 9 year review cycle.
- p) Prepares RE & PP billing file for Munis billing system; working with staff to insure the successful upload to the tax collection module.
- q) Conduct on-site inspections for each new business; provide on-site audits of least 10 - 12 percent of accounts yearly, in order to finalize the business assets that are needed to properly list the personal property assessments in compliance with the DOR directives cyclical program.
- r) Provide the services of an associate assessor specifically assigned to Lunenburg and such other staff required to fulfill the scope of services. The associate assessor will be in the Lunenburg office a minimum of 45 calendar days throughout the year and be dedicated to serving Lunenburg an additional 45 calendar days either on-site, or remotely from an off-site location.
- s) Provide the services of supervising assessor on-site for a minimum of 120 hours per year for “higher order” technical assistance to town manager, financial director, associate assessor, administrative assessor and other town office staff.
- t) Assist the Towns in such other capacities as the Board of Assessors may approve.
- u) Provide the assistance of a relief administrative clerk as needed (per diem to be quoted in the non-price proposal).

### **Minimum Qualifications**

The Town seeks an individual or firm with considerable tax assessment and administration experience to oversee the operations of the Assessors’ Office. The proposer and his/her contracting staff will possess these minimum qualifications and demonstrate same on his or her submitted resume:

- a) have successfully completed the Massachusetts Department of Revenue Course 101 on property tax administration,
- b) with respect to the principal assessor have at least ten years’ experience as a principal assessor or equivalent within the Commonwealth of Massachusetts,
- c) have worked simultaneously in three or more communities and demonstrated success in managing the affairs of multiple offices,
- d) hold a bachelor’s degree in business administration, real estate, economics or similar field of study,

e) with respect to the principal assessor successfully completed no less than 300 hours of specialized valuation and tax administration coursework through either the International Association of Assessing Officers (IAAO) or the Massachusetts Association of Assessing Officers (MAAO),

f) demonstrate considerable experience in the CSC-CAMA system,

g) and, demonstrate considerable experience in the use of Geographic Information Systems (GIS).

### **Criteria for review**

In accordance with MGL 30B the proposals submitted will be reviewed and rated on a scale consisting of non-advantageous, advantageous and most advantageous. The proposal that receives the largest number of most advantageous ratings will be considered the successful proposal. Any proposal that receives a non-advantageous rating in any of the following criteria will not be considered for further review by the Towns.

1. Massachusetts business/resident:
  - Non advantageous – Lives or business office outside of Massachusetts
  - Advantageous – Lives or business office within 40 miles from Lunenburg
  - Most advantageous – Lives or business office within 20 miles from Lunenburg
2. Experience in Massachusetts as an Assessor/Principal Assessor:
  - Non advantageous – Less and equal to five years.
  - Advantageous – More than five and less than ten years.
  - Most advantageous – Ten or more years
3. Experience working with multiple communities:
  - Non advantageous – No experience working with multiple communities.
  - Advantageous – Experience working with two to three communities at one time.
  - Most advantageous – Experience working with more than three communities at one time
4. Computer Assisted Mass Appraisal Systems knowledge and experience:
  - Non advantageous – No experience with CSC-CAMA system
  - Advantageous – At least 5 years working with the CAMA systems with some experience working with the CSC-CAMA system.
  - Most advantageous – At least 10 years working with the CSC-CAMA system
5. Geographic Information System experience and knowledge:
  - Non advantageous – One to three years experience

- Advantageous – Four to seven years experience
  - Most advantageous – Over seven years experience
6. Continuing Education criteria:
- Non advantageous – Less than three courses offered by either the MAAO or the IAAO.
  - Advantageous – Three to six courses and hold certificates for each either from MAAO or IAAO.
  - Most advantageous – Seven or more courses and hold certificates for each either from MAAO or IAAO.
7. Conducted Residential and Commercial/Industrial Revaluations:
- Non advantageous – Conducted 10 or fewer revaluations of residential properties and not commercial/industrial revaluations.
  - Advantageous – Conducted 11-20 residential revaluations and at least 5 complete commercial/industrial revaluation.
  - Most advantageous – Conducted more than 20 residential revaluations and more than 10 commercial/industrial revaluations.
8. Prepared cases for and represented a municipality before the Appellate Tax Board:
- Non advantageous – Prepared for and represented municipalities in 10 or less Appellate Tax Board hearings.
  - Advantageous – Prepared for and represented municipalities in 11-20 Appellate Tax Board hearings with at least 5 cases being commercial or industrial properties.
  - Most advantageous – Prepared for and represented municipalities in more than 20 Appellate Tax Board hearings with at least 8 cases being commercial or industrial properties.

**Rule for Award.** The Town will select the responsive and responsible individual or firm submitting the most advantageous proposal, taking into consideration the individual's or firm's experience, staff capacity, references, and plan of services as well as the proposal price.

### **Proposed Contract**

The proposal will include a sample contract covering all of the substantive issues addressed in this RFP. The Town reserves the right to develop its own contract for final signing. The successful bidder's non-price and price proposals will become an addendum to the contract. **Important - the draft contract should not state the bid price but provide appropriate blanks for same. Remember, the price proposal is to be provided under separate cover.**

The contract is for a three year period commencing August 1, 2016 and ending June 30, 2019. Annual compensation increases should be addressed in the price proposal.

## **References**

The proposer should provide resumes for all staff members who would be responsible for servicing the contract.